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The Directory brings together details of information available from some 35 data collections relating to superannuation and retirement, covering a range of private and government sources. The Directory is similar in format and purpose to the Directory of Housing Related Statistics (1118.0).

This publication has been converted from older electronic formats and does not necessarily have the same appearance and functionality as later releases.

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[Super Review](#)

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[Reserve Bank of Australia](#)

[Australian Economic Statistics 1949-50 to 1994-95](#)

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Preface

This Directory contains details and descriptions of superannuation related statistics available from both private and public sector organisations. Superannuation related statistics cover the spectrum from broad economic and social aggregates to detailed market research. This Directory is intended to assist those interested in the subject of superannuation to locate relevant statistical information.

Since the first edition of the Directory was published in 1991, major changes have occurred in superannuation, such as the introduction of compulsory employer contributions as a result of the Superannuation Guarantee Charge. The *Superannuation Industry Supervision (SIS) Act 1993* replaced the *Occupational Superannuation Standards Act* as the legislative framework for the industry. Total superannuation assets at June 1991 were estimated at \$134 billion and have more than doubled to be almost \$304 billion in June 1997.

The ABS has endeavoured to include all sources of superannuation related data that are available to the public and which relate to the latest five years. Readers should advise the ABS of any data sources not included in this directory as we plan to produce further editions as the need arises. If you are aware of any organisations which produce superannuation related statistics which have not been listed in this edition, or wish to comment on any other aspect of this publication, please contact Ms. Roberta Millucci on (02) 6252 7115 or refer to page 111 of this Directory.

I would like to thank the many organisations which took the time to complete their entries for this Directory.

While every reasonable effort has been made to ensure the contents of the Directory are reliable, the ABS accepts no responsibility for the accuracy of submissions from other organisations.

Dennis Trewin
Acting Australian Statistician
October 1997

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How to Use This Directory

You can locate an entry in two ways;

- by name of the contributing organisation;
- by name of a particular publication.

Part A, the Contributor Index, lists contributors to the Directory alphabetically by organisation name.

Part C, ABS Services, lists the address details for the central and state offices of the ABS as well as a breakdown of the services that are available (e.g. bookshops, libraries, consultancies etc.).

Part D, the Product Index, lists all publications mentioned in the Directory, in alphabetical order of publication name.

The entries themselves are located in Part B, in alphabetical order of contributing organisation. The Directory uses a common set of headings to present the information about each statistical source. The contents applicable to each heading used in Directory entries is as follows:

Name of Organisation

Gives the name, address, main switch telephone number, facsimile number, Email address and Web Site of the disseminating organisation.

Product and Services

Provides name and title of the product and details of the forms in which the published statistics are available

(e.g. publication, magnetic tape, computer printout, floppy disk, CD Rom) and the cost of obtaining the data in these forms. Note that all prices quoted are subject to change without notice and therefore should be used as a general guide only. If prices are determined on an individual request basis, 'price on application' is recorded here. All prices quoted are per copy unless specified otherwise.

Contact*About these statistics*

Gives the name and position of the person in the organisation to contact for further information about the statistics, name of the section or subsection in which the contact person is located (if applicable) and the contact telephone number (if a direct line is available).

To Purchase Statistics

If the point of sale is different from the contact person for further information, a contact is noted here (e.g. bookshop, publicity department) and the contact telephone number (if a direct line is available).

Broad Description

Offers a brief description of the contents of the statistics.

Purpose of Data

Outlines the reason why the statistics are compiled and what they are used for.

Detailed Description*Population*

Gives information about the units of measurement used in the survey (e.g. funds, persons, households).

Superannuation Data Items

Describes in detail the information to be found in the statistics, generally including the units in which data are recorded (e.g. million dollars, number of fund members etc.), names of major groups of items, classifications used and cross-classifications available.

Some contributors have included a one sentence sample of recent information as an example of what can be drawn out of the statistics offered by them.

Source

Discloses whether the data are collected directly by the organisation and the extent of reliance on data from other sources, if any.

Method of Collection

This category is intended to give relevant information about the collection methodology, e.g. method of data collection, proportion of market covered, reliability, sample size.

If the data are an administrative by-product, that fact will be noted here.

Frequency

Provides the periods for which the data are available, eg e.g. quarterly, monthly, annually or irregularly.

Timeliness

Indicates how long after the reference period the statistics become available and/or are published.

Historical Data

Reveals the period from which past data (time series) are available.

Geographic Breakdown

Provides details of geographic area covered by the collection (e.g. Australia, States, Territories, capital cities, statistical divisions, statistical local areas, local government areas).

Confidentiality and Availability

Outlines any restrictions placed upon access to the data.

Note: this category does not relate to copyright. It relates to whether any data which are collected cannot be released from the collecting organisation. For example, the *Census & Statistics Act* requires that statistics not be published by ABS where it is possible for a third party to identify data supplied by a particular person or organisation. Confidentiality provisions also place restrictions on release of unpublished information.

Unpublished Information

Gives an indication of whether information beyond that described in the entry can be made available on request (subject to any confidentiality restrictions).

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ASSIRT Tables

Name of Organisation

ASSIRT Investment Research & Technology

Level 3

345 George Street

SYDNEY NSW 2000

Switchboard: (02) 9320 0299

Facsimile: (02) 9262 3224

Products and Services

Name/Title of Product

ASSIRT Tables

Disemination Media

Publication, floppy Disk, magnetic/foreign tape, software package, modem transfer. Prices are available on application. A minimum fee of \$300.00 applies.

Contact

About these statistics and to purchase these statistics

Ms Carolyn Hampton

Manager, Funds Information

Telephone: (02) 9320 0299

Broad Description

Data available on all publicly available retail and wholesale managed funds.

Purpose of Data

Statistics/research undertaken to enable assessment of investment merits of managed funds and for industry analysis. Data to track performance of managed funds.

Detailed Description

Population

All publicly available managed funds.

Superannuation Data Items

Performance and fund research information on managers and the superannuation investment alternatives they offer.

Source

Data are collected directly by ASSIRT from fund managers.

Method of Collection

Standardised industry forms plus specialised ASSIRT forms completed by managers to encompass all publicly available managed funds.

Frequency

Daily, monthly and quarterly dependent on nature of data.

Timeliness

Maximum of 6 weeks after the reference period.

Historical Data

Data are available from 1982.

Geographic Breakdown

Australia.

Confidentiality and Availability

Confidentiality is assessed on a case by case basis.

Unpublished Information

Unpublished information is available. Price on application.

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Association of Superannuation Funds of Australia (ASFA)

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Superfunds Magazine

Name of Organisation

ASSIRT Investment Research & Technology

Level 3

345 George Street

SYDNEY NSW 2000

Switchboard: (02) 9320 0299

Facsimile: (02) 9262 3224

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[Business Operations and Industry Performance, Australia \(Cat. No. 8140.0\)](#)

[Census of Population & Housing 1996 \(various\)](#)

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[Labour Force Status & Other Characteristics of Migrants, Australia, November 1996 \(Cat. No. 6250.0\)](#)

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[Superannuation, Australia, November 1995 \(Cat. No. 6319.0\)](#)

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Assets of Superannuation Funds & ADF's (cat. no. 5656.0)

Name of Organisation

Australian Bureau of Statistics

PO Box 10

BELCONNEN ACT 2616

Switchboard: (02) 6252 7911

Facsimile: (02) 6252 7549

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

[Assets of Superannuation Funds and Approved Deposit Funds](#) (cat. no. 5656.0) Data is only available up to 30 June 1995.

Dissemination Media

Data are also available on PCAUSSTATS.

Contact

About these statistics

Mr John Carson
Assistant Director
Financial Accounts Section
Telephone: (02) 6252 7109
To purchase these statistics

Please refer to Part C - ABS Services of this directory.

Broad Description

Brings together data on the assets of the superannuation industry. Statistics are provided for various organisations involved with the investment of the assets of superannuation funds and approved deposit funds.

Purpose of Data

To provide information on the size and growth of superannuation funds as a source of savings and also used as an input to the production of the Australian National Accounts: Financial Accounts.

Detailed Description

Population Details

100 largest superannuation and approved deposit funds; 80 fund managers and 29 of the largest life offices.

Superannuation Data Items

- Total assets of superannuation funds and approved deposit funds by type of asset.
- Assets of superannuation funds held in the Statutory funds of Life Offices by type of asset.
- Total Assets of superannuation funds and ADFs held outside the Statutory funds of Life Offices by type of asset.
- Types of assets of superannuation funds and ADFs held outside the Statutory funds of Life Offices directly invested.
- Types of assets of superannuation funds and ADFs held outside the Statutory funds of Life Offices invested through fund managers

Source

Compiled from information collected by the ABS from its Survey of Balance Sheet Information and information collected by the Insurance and Superannuation Commission (ISC) for inclusion in its Quarterly Statistical Bulletin.

Method of Collection

The survey has now ceased; the last statistics were published in the June 1995 publication.

Frequency

Quarterly up to June 1995.

Timeliness

Not Applicable.

Historical Data

June 1988 - June 1995.

Geographic Breakdown

Australia.

Confidentiality and Availability

Data are subject to confidentiality restrictions under the *Census and Statistics Act 1905*.

Unpublished Information

May be available on request, subject to confidentiality restrictions.

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Australian National Accounts: Financial Accounts (cat. no. 5232.0)

Name of Organisation

Australian Bureau of Statistics

PO Box 10

BELCONNEN ACT 2616

Switchboard: (02) 6252 7911

Facsimile: (02) 6252 7549

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

[Australian National Accounts: Financial Accounts](#) (cat. no. 5232.0)

Dissemination Media

Publication \$22.00 per issue. Data are also available on floppy disk and as a Special Data Service. Price on application.

Contact

About these statistics

Mr Derick Cullen

Director

Financial Accounts Section

Telephone: (02) 6252 6244

To purchase these statistics

Please refer to Part C - ABS Services of this Directory.

Broad Description

Quarterly estimates of flows of finance between the Life and Superannuation sector and other sectors; disaggregations of flows and levels of finance by sector and subsector.

Purpose of Data

Flow of funds statistics; national accounts capital account. The data published provides a quarterly statement of financial flows between the different sectors of Australia's economy.

Detailed Description

Population

Estimates for all superannuation funds.

Superannuation Data Items

Transactions, valuation adjustments and levels of financial assets and liabilities and non-financial assets. Flow of funds data relating to superannuation (published 5232.0) differ from those published in the ISC quarterly bulletin in that they measure the flows as well as the levels of financial assets and liabilities, with adjustments to the flows for changes in the value of the assets and liabilities. Also, flow of funds estimates are consistent with data published in the Australian National Accounts, Balance of Payments and International Investment statistics. It is possible to disaggregate Flow of Funds data for the Life and Superannuation sector into sub-sectors (life offices, superannuation funds, friendly societies) while still retaining this consistency with the Australian National Accounts.

Source

ABS Survey of Financial Information, Insurance and Superannuation Commission data and price deflators maintained by the industry.

Method of Collection

Analysis of information obtained from all three sources.

Frequency

Quarterly.

Timeliness

11 to 12 weeks after the reference period.

Historical Data

December 1988 first quarter for levels data, March 1989 first quarter for flows and adjustments.

Geographic Breakdown

Flow of funds statistics focus on flows between each sector and other sectors of the domestic economy and /or rest of the world (non-residents as a group). However, figures for total of domestic sectors provide a measure of the total Australian domestic market for each financial instrument.

Confidentiality and Availability

Data are subject to confidentiality restrictions under the *Census and Statistics Act 1905*. Most cells unlikely to be confidential.

Unpublished Information

Special Data Services are available, price on application.

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Australian National Accounts: National Income & Expenditure Product (cat. no. 5204.0)

Name of Organisation

Australian Bureau of Statistics

PO Box 10

BELCONNEN ACT 2616

Switchboard: (02) 6252 7911

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Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

[Australian National Accounts: National Income, Expenditure and Product](#) (cat. no. 5204.0)

Dissemination Media

Publication \$29.00 per issue.

Contact

About these statistics

Mr Ross Harvey
The Director
National Income & Expenditure Section
Telephone: (02) 6252 6713
To purchase these statistics
Please refer to Part C - ABS Services of this directory.

Broad Description

National accounts aggregates contained in Income and Outlay and Capital Accounts.

Purpose of Data

Life insurance offices and superannuation funds are a subsector of the financial enterprises institutional sector in the Australian National Accounts.

Detailed Description*Population*

All life insurance offices and superannuation funds.

Superannuation Data Items

Income and Outlay Account and Capital Account for life insurance offices and superannuation funds. Included are details about premiums, claims, administrative costs, property income and net equity of households in life offices and superannuation funds.

Source

Compiled from all available data sources, including ABS publications and data from the Insurance and Superannuation Commission.

Method of Collection

Analysis of all available relevant information.

Frequency

Annual.

Timeliness

Generally about 11 months after the end of the financial year to which the data relate. It is expected that future publications/data will become available between 6 to 8 months after the reference period.

Historical Data

Data are published for the latest 12 years.

Geographic Breakdown

Data generally available for Australia.

Confidentiality and Availability

No confidentiality restrictions apply since only aggregate data are available for the whole industry.

Unpublished Information

There are no unpublished data available.

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Business Operations and Industry Performance, Australia (cat. no. 8140.0)

Name of Organisation

Australian Bureau of Statistics

PO Box 10

BELCONNEN ACT 2616

Switchboard: (02) 6252 6627

Facsimile: (02) 6253 1497

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

[Business operations and industry performance, Australia](#) (cat. no. 8140.0)

Dissemination Media

Publication \$24.00 per issue

Contact

About these statistics

Mr Bob Harrison

Project Manager

Economy Wide Statistics

Telephone: (02) 6252 5521

To purchase these statistics

Please refer to Part C - ABS Services of this directory.

Broad Description

Profit and loss (financial) statement and balance sheet information for all industries (excluding General Government).

Purpose of Data

To provide financial statistics, including aggregates and ratios, based on profit and loss statements and balance sheet accounts of businesses in all industries of the Australian economy.

Detailed Description

Population

The survey frame for the Economic Activity Survey included all survey units (ie. management units) which operated for some time between 1 July 1995 and 30 June 1996 and were not considered to be part of the General Government sector.

Superannuation Data Items

The Economic Activity Survey collects detailed income and expenditure items and broad level asset and liability information. Information on employer contributions to superannuation funds is also collected across all industries (although these data are not published). As data are only available at the subdivision level of the Australian and New Zealand Standard Industrial Classification (ANZSIC), separate data for the superannuation industry are not available (ie they are included with data for the insurance industry).

Source

Compiled from information collected by the ABS from the Economic Activity Survey.

Method of Collection

The Economic Activity Survey covers over 22,000 management units. Due to the stratification used by the ABS, the number of superannuation entities covered is not known. Non-employers are excluded from the scope of the survey.

Frequency

Annual.

Timeliness

Data becomes available within 12 months of the end of the reference period.

Historical Data

Annual data from 1990/91 is available.

Geographic Breakdown

Data available for Australia only.

Confidentiality and Availability

Data are subject to confidentiality restrictions under the *Census and Statistics Act 1905*. Data are only available at the subdivision level of the ANZSIC. This means that superannuation statistics are included with the Insurance industry.

Unpublished Information

Unpublished data may be available on request subject to the confidentiality restrictions above and quality checks. Contact Dianne Bourke, Client Services Manager, Economy Wide Statistics on (02) 6252 5288.

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Census of Population & Housing 1996 (various)

Name of Organisation

Australian Bureau of Statistics

PO Box 10

BELCONNEN ACT 2616

Switchboard: (02) 6252 6627

Fasimile: (02) 6252 7102

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

1996 Census of Population & Housing (various catalogue numbers)

Dissemination Media

Various publications, CD Roms, floppy disks, magnetic/foreign tapes and software packages. Prices are available on application. Minimum fee of \$100.00 applies to Special Data Services.

Contact

About these statistics

Ms Gill McPadden

The Manager

Client Services and Statistical Support

Telephone: (02) 6252 7867

To purchase these statistics

Please refer to Part C - ABS Services of this Directory.

Broad Description

The Census of Population and Housing is the largest statistical collection undertaken by the Australian Bureau of Statistics. The census measures key social and demographic characteristics of all people in Australia and the dwelling in which they live on Census night. A wide range of products and services are available from this collection.

Purpose of Data

Census information is used to support the planning, administration, policy development & evaluation of the activities of governments, business, researchers and other users. Census data may be used by the superannuation industry for forecasting purposes.

Detailed Description

Population

Every individual and dwelling in Australia on Census night.

Superannuation Data Items

The Census data does not include information about a person's superannuation but does cover a wide range of demographic, social, housing, family and labour force data for all persons, families and dwellings in Australia on Census night.

This basic information assists researchers to analyse and forecast future trends. Information available includes details of the Australian population by:

- age
- main source of income per person/household (including superannuation)
- labour force status (employment status)
- educational qualifications
- employment industry

Source

5 yearly Census of Population and Housing.

Method of Collection

Data are collected and processed by the Australian Bureau of Statistics. Self enumerated by respondents Australia wide.

Frequency

5 yearly.

Timeliness

First Release data is available approximately within 12 months of Census night. Second Release data is available approximately within 15 months of Census night.

Historical Data

From 1911 at varying periods. From 1961 at 5 yearly intervals.

Geographic Breakdown

Data are available for Australia, each State and Territory, Census specific areas (e.g. Postal Areas, Commonwealth & State Electoral Divisions, and Collection Districts).

Confidentiality and Availability

Data are subject to confidentiality restrictions under the *Census and Statistics Act 1905*.

Unpublished Information

Customised census data are available on request. Price will vary depending on size and complexity of request.

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Employment Benefits, Australia (cat. no. 6334.0.40.001)

Name of Organisation

Australian Bureau of Statistics

PO Box 10

BELCONNEN ACT 2616

Switchboard: (02) 6252 7911

Facsimile: (02) 6252 7784

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

Employment benefits, Australia (cat. no. 6334.0.40.001)

Dissemination Media

Publication \$17.50 per issue.

Contact

About these statistics

Mr Michael Jones

The Manager
Labour Force Section/Supplementary Surveys
Telephone: (02) 6252 6503
To purchase these statistics
Please refer to Part C - ABS Services of this directory.

Broad Description

Information on forms of remuneration (other than usual pay) received by employees and other conditions of their employment.

Purpose of Data

Estimates of the numbers and types of employment benefits (including superannuation) received by employees, cross-classified by demographic and labour force characteristics.

Detailed Description*Population*

Persons aged 15 and over employed as wage and salary earners.

Superannuation Data Items

Superannuation scheme membership provided by an employer as a benefit in an employee's main job. Data items may be cross-classified by gender, occupation, industry, full or part-time work, age, permanent or casual employment, weekly earnings, sector, size of location.

Source

This survey is conducted by the ABS as a supplement to the Labour Force Survey.

Method of Collection

The Labour Force Survey is dwellings-based and covers about three-fifths of one percent of the population of Australia. The information is obtained from the occupants of selected dwellings by trained interviewers. Additional questions relating to special topics are asked of those who fall within the scope of the supplementary survey.

Frequency

Irregular.

Timeliness

6 months after the reference period.

Historical Data

Similar surveys were conducted in February to May 1979, and annually from August 1983 to August 1992. The last survey was conducted in August 1994. The next survey is scheduled in August 1999.

Geographic Breakdown

Data are available for Australia, each State and Territory and for certain regions within each State.

Confidentiality and Availability

Tables compiled from ABS household surveys do not enable individual respondents to be identified. As a result, a wide range of customised tables can be produced.

Unpublished Information

Unpublished tables are available on request as a Special Data Service. Contact the Assistant Director, Labour Force Section (Supplementary Surveys) on (02) 6252 6504 for an order form and to discuss your data needs. Customised tables are available on computer printout or floppy disk. Prices for the Special Data Service depend on the medium of supply and the volume of data, and are available on request.

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Household Income & Expenditure Survey (1993-94): Australian Household Characteristics (cat. no. 6531.0)

Name of Organisation

Australian Bureau of Statistics

PO Box 10

BELCONNEN ACT 2616

Switchboard: (02) 6252 5000

Facsimile: (02) 6252 6870

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

[1993-94 Household Expenditure Survey, Australia, Household Characteristics](#) (cat. no. 6531.0)

Dissemination Media

Publication \$18.50 per issue and floppy disk \$18.50 each.

Contact

About these statistics

Mr Allan Etheredge

Assistant Director

Household Income and Expenditure Section

Telephone: (02) 6252 7031

To purchase these statistics

Please refer to Part C - ABS Services of this Directory.

Broad Description

Household expenditure data at the finest level of detail.

Purpose of Data

Data are collected as part of the Household Expenditure Survey (HES), which provides data to update the weighting pattern of the CPI, and to provide data for research and planning purposes. For example, HES data can be used to analyse distributional characteristics of expenditure and data can be generated relating to consumer behaviour.

Detailed Description

Population

Households are private dwellings and caravan parks. Hotels, boarding houses, institutions, etc. are regarded as special dwellings outside the scope of the survey.

Superannuation Data Items

For households with superannuation as principal source of income, for each gross income quintile: expenditure by broad expenditure group (Fuel & Power, Clothing & Footwear, Transport, Recreation etc.) and selected other payments (income tax, mortgage payment-principal, and other capital housing costs) and household characteristics (average weekly household income, average age of reference person, average number of persons in the household, proportion of households where housing is owned outright etc.). Note that superannuation received as a lump sum is regarded as maturity of an investment rather than income, whereas superannuation receipts received regularly and are of a recurring nature are regarded as income.

Other identifying characteristics of households can be used when requesting unpublished information, for example, number of retired persons in households and number of pension beneficiaries in households.

Source

Collected by the ABS as part of the Household Expenditure Survey.

Method of Collection

The Household Expenditure Survey covers approximately 8,400 households throughout Australia. Trained

interviewers collect information on expenditure items which occur infrequently and details of income from all household members aged 15 and over. In addition, household members aged 15 and over record all payments made during a two week period in a diary provided to each of them. Consequently, each household is involved in the survey for 2 weeks, although the sample of households is spread evenly over the twelve month survey period.

Frequency

Irregular.

Timeliness

About 18 months after the reference period.

Historical Data

Housing Expenditure Surveys were previously conducted in 1974-75, 1975-76, 1984 and 1988-89.

Geographic Breakdown

Australia, State, capital cities and certain other geographic areas.

Confidentiality and Availability

Data are subject to confidentiality restrictions under the *Census and Statistics Act 1905*, which requires that information not be released in a manner that is likely to enable identification of a particular person or organisation.

In addition, the amount of detail which can be made available for a specific geographic area will depend on the level of standard error that is considered acceptable for the use to which the data will be put.

Unpublished Information

Confidentialised data releases include unit record data and special order tables. Prices for these services are available on request.

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Household Income & Expenditure Survey (1993-94): Detailed Expenditure Items (cat. no. 6535.0)

Name of Organisation

Australian Bureau of Statistics

PO Box 10

BELCONNEN ACT 2616

Switchboard: (02) 6252 5000

Facsimile: (02) 6252 6870

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

[1993-94 Household Expenditure Survey, Australia, Detailed Expenditure Items](#) (cat. no. 6535.0)

Publication \$18.50 per issue and floppy disk \$18.50 each.

Contact

About these statistics

Mr Allan Etheredge
Assistant Director
Household Income and Expenditure Section
Telephone: (02) 6252 7031
To purchase these statistics
Please refer to Part C - ABS Services of this Directory.

Broad Description

Household expenditure data at the finest level of detail.

Purpose of Data

Data are collected as part of the Household Expenditure Survey (HES), which provides data to update the weighting pattern of the CPI, and to provide data for research and planning purposes. For example, HES data can be used to analyse distributional characteristics of expenditure and data can be generated relating to consumer behaviour.

Detailed Description*Population*

Households are private dwellings and caravan parks. Hotels, boarding houses, institutions, etc. are regarded as special dwellings outside the scope of the survey.

Superannuation Data Items

Average weekly household expenditure (\$) on superannuation and annuities by gross income quintile.

Average expenditure for only those households recording such expenditure is also available on request, as unpublished information.

Source

Collected by the ABS as part of the Household Expenditure survey.

Method of Collection

The Household Expenditure Survey covers approximately 8,400 households throughout Australia. Trained interviewers collect information on expenditure items which occur infrequently and details of income from all household members aged 15 and over. In addition, household members aged 15 and over record all payments made during a two week period in a diary provided to each of them. Consequently, each household is involved in the survey for 2 weeks, although the sample of households is spread evenly over the twelve month survey period.

Frequency

Irregular.

Timeliness

About 18 months after the reference period.

Historical Data

Housing Expenditure Surveys were previously conducted in 1974-75, 1975-76, 1984 and 1988-89.

Geographic Breakdown

Australia, State, capital cities and certain other geographic areas.

Confidentiality and Availability

Data are subject to confidentiality restrictions under the *Census and Statistics Act 1905*, which requires that information not be released in a manner that is likely to enable identification of a particular person or organisation.

In addition, the amount of detail which can be made available for a specific geographic area will depend on the level of standard error that is considered acceptable for the use to which the data will be put.

Unpublished Information

Non-publication data releases are primarily confidentialised unit record data (on magnetic tape or floppy disk), special order tables (in hardcopy or machine readable form) for specific purpose data release (i.e. ABS processes unit record data for you). Prices for these services are available on request.

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Labour Costs, Australia (cat. no. 6348.0)

Name of Organisation

Australian Bureau of Statistics

Labour Statistics Centre

GPO Box K881

PERTH WA 6001

Switchboard: (08) 9360 5323

Facsimile: (08) 9360 5954

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

[Labour Costs, Australia](#) (cat. no. 6348.0)

Dissemination Media

Publication \$25.00 per issue.

Contact

About these statistics

Mr Rory Carle
Senior Manager
Labour Statistics Centre Output Group
Telephone: (08) 9360 5286
To purchase these statistics
Please refer to Part C - ABS Services of this directory.

Broad Description

Employer labour costs (including employer provided superannuation).

Purpose of Data

To provide information on the costs to employers of employing labour.

Detailed Description*Population*

All private and public sector employees in all States and Territories and in all industries except Agriculture, forestry, fishing and hunting. Private households employing staff, and Australian permanent defence forces are also excluded.

Superannuation Data Items

Superannuation costs given are the total payments made by employers with respect to superannuation liabilities incurred. For the private sector these are contributions paid on a regular basis into superannuation funds. For payments, the cost of pensioner lump sum payments which are not covered by contributions during the employees service are also included. Superannuation data are presented in the following basis; total cost, cost per employee, cost per employee covered by superannuation, cost as a percentage of major labour costs and cost as a ratio to employees covered by superannuation.

Data are available by sector, State and Territory, employer size, industry, institutional sector and level of government.

Source

Data are collected by the ABS in the Survey of Major Labour Costs.

Method of Collection

The survey is conducted by mail covering private and public sector employer units selected from the ABS Register of Businesses. Superannuation Boards and Treasury Departments provide some information for government organisations directly to the ABS.

Frequency

Between three to five years.

Timeliness

Twelve months after the reference period.

Historical Data

Data are available from 1985-96 in respect of private sector. Data from 1986-87 includes the public sector.

Geographic Breakdown

Data are available for Australia, each State and Territory.

Confidentiality and Availability

Data are subject to confidentiality restrictions under the *Census and Statistics Act 1905*. Data at less aggregated levels may also be have lower levels of reliability due to high sampling error.

Unpublished Information

Unpublished data are available on request, subject to the restrictions above.

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Labour Force Status & Other Characteristics of Migrants, Australia, November 1996 (cat. no. 6250.0)

Name of Organisation

Australian Bureau of Statistics

PO Box 10

BELCONNEN ACT 2616

Switchboard: (02) 6252 7911

Facsimile: (02) 6252 7784

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

[Labour Force Status and Other Characteristics of Migrants, Australia, November 1996](#) (cat. no. 6250.0.)

Dissemination Media

Publication \$15.50 per issue.

Contact

About these statistics

Mr Robert Bibo

The Manager

Labour Force Section

Telephone: (02) 6252 6661

To purchase these statistics

Please refer to Part C - ABS Services of this directory.

Broad Description

This publication presents information about the labour force status and other characteristics of persons who migrated to Australia as adults after 1970.

Purpose of Data

The information collected enables an assessment of the labour market experience of migrants.

Detailed Description

Population

Data from the survey relates to persons who were not born in Australia, had arrived in Australia after 1970, were aged 18 years and over on arrival and had obtained permanent resident status.

Superannuation Data Items

Number of migrants who reported that superannuation is their main source of income is available.

Source

This survey is conducted by the ABS as a supplement to the monthly Labour Force survey.

Method of Collection

The Labour Force survey is dwelling based and covers about three-fifths of one percent of the Australian population.

Frequency

Triennially.

Timeliness

Data becomes available six months after the reference period.

Historical Data

Data are available for the years 1990, 1993 and 1996.

Geographic Breakdown

Standard labour force dissemination regions are available.

Confidentiality and Availability

Data are not available where a significant level of relative standard error exists or where data are confidential.

Unpublished Information

Unpublished data are available on request.

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Managed Funds, Australia (cat. no. 5655.0)

Name of Organisation

Australian Bureau of Statistics

PO Box 10

BELCONNEN ACT 2616

Switchboard: (02) 6252 6627

Facsimile: (02) 6252 7549

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

[Managed Funds, Australia](#) (cat. no. 5655.0)

Dissemination Media

Publication \$16.50 per issue. Also available on PCAUSSTATS. Special Data Services are available in various formats for more detailed data. Price on application.

Contact

About these statistics

Mr John Carson
Assistant Director
Financial Accounts Section
Telephone: (02) 6252 7109
To purchase these statistics

Please refer to Part C - ABS Services of this directory.

Broad Description

The statistics provide a quarterly asset profile of the investments held by managed funds institutions.

Purpose of Data

Statistics provide an overall measure of the size and composition of the managed funds market in Australia. They also monitor changes in market share between the managed funds institutions.

Detailed Description

Population

Life offices, ISC regulated superannuation funds, public unit trusts, friendly societies, common funds, cash management trusts and investment managers.

Superannuation Data Items

Total assets of superannuation funds on a consolidated basis (\$m). Type of assets held by superannuation funds on an unconsolidated basis (\$m). Type of assets include cash and deposits, loans and placements, short term securities by type of security held and issuing institution/sector, long term securities by type of security held and issuing institution/sector, equities and units in trusts, other financial assets, non-financial assets and overseas assets.

Source

Data in the publication are obtained from 3 sources; ABS Survey of Financial Information; ABS/ISC Quarterly Survey of Superannuation and other Insurance and Superannuation Commission data sources.

Method of Collection

The ABS Survey of Financial Information is a mail based survey of financial and corporate trading enterprises and general government institutions. The Survey of Superannuation includes all ISC regulated superannuation funds with assets above \$10m and/or with over 500 members. ISC data sources are principally data aggregates derived from the ISC compliance database.

Frequency

Data on cash management trusts are compiled and published monthly. All other data are collected on a quarterly basis.

Timeliness

Statistics are released approx 10 weeks after the reference period. Data on cash management trusts are also released as a Special Data Service approximately 4 weeks after the reference period.

Historical Data

Statistics on cash management trusts are available on a monthly basis from June 1988 onwards; all other statistics are available from June 1988 quarter and every quarter thereafter.

Geographic Breakdown

Australia only.

Confidentiality and Availability

Data are subject to confidentiality restrictions under the *Census and Statistics Act 1905*.

Unpublished Information

More detailed data on financial instruments (assets) are generally available. More detailed data by type of institution are available for certain institutions eg. public unit trusts are further classified as listed and unlisted and according to investment strategy eg. equity trusts, mortgage trusts etc. The more detailed data are available as a Special Data Service only.

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Persons Employed at Home, Australia, September 1995 (cat. no. 6275.0)

Name of Organisation

Australian Bureau of Statistics

PO Box 10,

BELCONNEN ACT 2616

Switchboard: (02) 6252 7911

Facsimile: (02) 6252 7784

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

[Persons Employed at Home, Australia, September 1995 \(cat. No. 6275.0\)](#)

Dissemination Media

Publication \$14.50 per issue.

Contact

About these statistics

Mr Robert Bibo

The Manager
Labour Force Section
Telephone: (02) 6252 6661
To purchase these statistics
Please refer to Part C - ABS Services of this directory.

Broad Description

This publication presents information about persons who worked more hours at home than elsewhere in either their main or second job.

Purpose of Data

The information collected enables an assessment of change in the nature of employment and of the importance of home based employment.

Detailed Description*Population*

Data from the survey relates to persons aged 15 years or more who were employed at home.

Superannuation Data Items

Data are available on the number of persons employed at home who are covered or not covered by superannuation.

Source

This survey is conducted by the ABS as a supplement to the monthly Labour Force Survey.

Method of Collection

The Labour Force Survey is dwelling based and covers about three-fifths of one percent of the Australian population.

Frequency

Irregularly.

Timeliness

Data becomes available six months after the reference period.

Historical Data

Data are available for the years 1989, 1992, and 1995.

Geographic Breakdown

Standard labour force dissemination regions are available.

Confidentiality and Availability

Data are not available where a significant level of relative standard error exists or where data are confidential.

Unpublished Information

Unpublished data are available on request.

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Retirement & Retirement Intentions (cat. no. 6238.0)

Name of Organisation

Australian Bureau of Statistics

PO Box 10

BELCONNEN ACT 2616

Switchboard: (02) 6252 7911

Facsimile: (02) 6252 7784

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

[Retirement and Retirement Intentions, Australia](#) (cat. no. 6238.0)

Dissemination Media

Publication \$16.00 per issue.

Contact

About these statistics

Ms Kirrilie Horswill

The Manager
Labour Force Section, Supplementary Surveys
Telephone: (02) 6252 7204
To purchase these statistics
Please refer to Part C - ABS Services of this Directory.

Broad Description

Details of retirement or retirement intentions of persons aged 45 and over, including main source of income, retirement scheme coverage and housing arrangements.

Purpose of Data

Comparative profile, and whether persons had retired or intended to retire from work with superannuation as the main source of income.

Detailed Description*Population*

Persons aged 45 and over excluding persons permanently unable to work and institutionalised persons.

Superannuation Data Items

For retired persons: retirement scheme membership, type of payment from retirement scheme, disbursement of lump sum payment on retirement, lump sum payments from superannuation schemes, and main source of income at retirement. For persons who intended to retire: retirement scheme membership, expected type of payment from retirement scheme, intended disbursement of lump sum on retirement, and expected main source of income at retirement. These data items can be cross classified with status of last job, reason for early retirement, gender, age and birthplace.

Source

Survey conducted by ABS as a supplement to the Labour Force survey.

Method of Collection

The Labour Force survey is dwellings-based and covers about three-fifths of one percent of the population of Australia. The information is obtained from the occupants of selected dwellings by trained interviewers. Additional questions relating to special topics are asked of those who fall within the scope of the supplementary survey.

Frequency

Irregular.

Timeliness

7 months after the reference period.

Historical Data

Data are available for November 1986, November 1989, November 1992. A survey will be conducted again in November 1997.

Geographic Breakdown

Data are available for Australia, each State and Territory and for certain regions within each State.

Confidentiality and Availability

Tables compiled from ABS household surveys do not enable individual respondents to be identified. As a result, a wide range of customised tables can be produced.

Unpublished Information

Unpublished tables are available on request as a Special Data Service. Contact the Assistant Director, Labour Force Section (Supplementary Surveys) on (02) 6252 6504 for an order form and to discuss your data needs. Customised tables are available on computer printout or floppy disk. Prices for the Special Data Service depend on the medium of supply and the volume of data, and are available on request.

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Superannuation, Australia, November 1995 (cat. no. 6319.0)

Name of Organisation

Australian Bureau of Statistics

PO Box 10

BELCONNEN ACT 2616

Switchboard: (02) 6252 7911

Facsimile: (02) 6252 7784

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

[Superannuation Australia](#), November 1995 (cat. no. 6319.0)

Dissemination Media

Publication \$16.50 per issue.

Contact

About these statistics

Ms Kirrilie Horswill

The Manager
Labour Force Section/Supplementary Surveys
Telephone: (02) 6252 7204.
To purchase these statistics
Please refer to Part C - ABS Services of this Directory.

Broad Description

Provides information on the number and characteristics of persons covered by superannuation schemes.

Purpose of Data

Provides details of persons who currently belong to a superannuation scheme, some details of persons who once belonged to a superannuation scheme and the relationship between superannuation and the age pension.

Detailed Description

Population

Civilian persons aged 15 to 74, excluding institutionalised persons and persons aged between 15 and 20 still at school. More detail on superannuation was collected from persons aged 45 to 74 than from those aged 15-44. Persons aged 15 to 44 were only asked superannuation questions relating to coverage and the number of accounts held.

Superannuation Data Items

Whether covered by a superannuation scheme - Details about type of contributions (personal and/or by employer/business): number of accounts; provider of scheme; time in scheme; weekly contribution; proportion of earnings contributed; whether compulsory to contribute; whether contributing more than required; reason not contributing personally; eligibility to contribute; expected payments and intended disbursement from scheme.

Previous superannuation coverage - Type of coverage, number of accounts with preserved benefits, time in scheme, type of payments received, disbursement and amount of lump sum received.

Preserved benefits - Whether preserved funds for future use, expected type of payment and intended disbursement.

Other details - Current main source of income, expected main source of income when ceased full-time work and main source of income when ceased full-time work. Usual gross weekly pay, occupation, industry, sector, trade union membership, permanent/casual status and socio-demographic information.

Source

This survey is conducted by the ABS as a supplement to the Labour Force survey.

Method of Collection

The Labour Force survey is dwellings-based and covers about three-fifths of one percent of the population of Australia. The information is obtained from the occupants of selected dwellings by trained interviewers. Additional questions relating to special topics are asked of those who fall within the scope of the supplementary survey.

Frequency

Irregular.

Timeliness

Data are available 5 months after the reference period.

Historical Data

Similar surveys were conducted in February 1974, September to November 1982, November 1988, November 1991 and November 1993.

Geographic Breakdown

Data are available for Australia, each State and Territory and for certain regions within each state.

Confidentiality and Availability

Tables compiled from ABS household surveys do not enable individual respondents to be identified. As a result, a wide range of customised tables can be produced.

Unpublished Information

Unpublished tables are available on request as a Special Data Service. Customised tables are available on computer printout or floppy disk. Prices for the Special Data Service depend on the medium of supply and the volume of data and are available on request.

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Trade Unions, Australia (cat. no. 6325.0)

Name of Organisation

Australian Bureau of Statistics

PO Box 10

BELCONNEN ACT 2616

Switchboard: (02) 6252 7911

Facsimile: (02) 6252 7784

Web Site: www.abs.gov.au

Email: client.services@abs.gov.au

Products and Services

Name/Title of Product

[Trade Unions, Australia](#) (cat. no. 6325.0)

Dissemination Media

Publication \$15.50 per issue.

Contact

About these statistics

Mr Michael Jones

The Manager
Labour Force Section/Supplementary Surveys
Telephone: (02) 6252 6503
To purchase these statistics
Please refer to Part C - ABS Services of this directory.

Broad Description

Social and demographic characteristics of union members and non-union members, who are employees in their main job.

Purpose of Data

Provides a comparison of union members and non-members. Characteristics of labour force participation are also provided.

Detailed Description*Population*

All employees, aged 15 and over, who were wage and salary earners in a main job. Persons on workers compensation are excluded.

Superannuation Data Items

Persons covered and not covered by a superannuation scheme and the source of the superannuation scheme. Other data items include: gender, age, sector, whether a member of a trade union, weekly earnings, industry and occupation.

Source

This survey is conducted by the ABS as a supplement to the Labour Force Survey.

Method of Collection

The Labour Force Survey is dwellings-based and covers about three-fifths of one percent of the population of Australia. The information is obtained from the occupants of selected dwellings by trained interviewers. Additional questions relating to special topics are asked of those who fall within the scope of the supplementary survey.

Frequency

Biennially.

Timeliness

6 months after the reference period.

Historical Data

Similar surveys were conducted in March-May 1982, August 1986, August 1988, August 1990, August 1992, August 1994 and August 1996. Results from this survey will be published again in August 1998.

Geographic Breakdown

Data are available for Australia, each State and Territory and for certain regions within each State.

Confidentiality and Availability

Tables compiled from ABS household surveys do not enable individual respondents to be identified. As a result, a wide range of customised tables can be produced.

Unpublished Information

Unpublished tables are available on request as a Special Data Service. Contact the Assistant Director, Labour Force section (Supplementary Surveys) on (02) 6252 6504 for an order form and to discuss your data needs. Customised tables are available on computer printout or floppy disk. Prices for the Special Data Service depend on the medium of supply and the volume of data, and are available on request.

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Australian Institute of Superannuation Trustees

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Survey of Superannuation Fund Performance

Name of Organisation

Australian Institute of Superannuation Trustees

Level 12

313 La Trobe Street

MELBOURNE VIC 3000

Switchboard: (03) 9602 4511

Facsimile: (03) 9602 1727

Products and Services

Name/Title of Product

Survey of Superannuation Fund Performance (Report on the 1997 AIST/CMSF)

Dissemination Media

Publication \$250.00 per issue.

Contact

About these statistics and to purchase these statistics

Ms Ros Bennett

Membership Officer

Telephone: (03) 9602 4511

Broad Description

The report provides summaries of the overall range of investment returns and crediting rates for all funds and for various sectors of funds averaged over the three years 1993-94 to 1995-96 and actual investment returns and crediting rates for each of the three years to the last financial year 1995-96.

Purpose of Data

These data were compiled in response to demands from AIST members for a survey which allows their funds performance to be compared against other comparable funds.

Detailed Description

Population

34 Corporate Funds, 37 Industry Funds and 17 Public Sector Funds.

Superannuation Data Items

- Annual returns in the 3 years (1993-96) - all funds.
- Average returns and average crediting rate by allocation to growth assets for 3 years (1993-96)
- Average returns and average crediting rate by allocation to growth assets (1993-94, 1994-95, 1995-96)
- Returns, crediting rate and allocation to growth assets by benefit type (hybrid, accumulation, defined) average 3 years (1993-96) and 1993-94, 1994-95 and 1995-96.
- Returns, credit rate and allocation to growth assets by fund type (industry, corporate, public sector) average 3 years (1993-96) and 1993-94, 1994-95 and 1995-96.
- Returns by size of fund (assets) average 3 years (1993-96) and 1993-94, 1994-95, and 1995-96. Asset breakdown available for funds with assets of \$1m - \$100m, \$100m - \$500m, \$500m - \$1b and \$1b - \$2b.

Source

Data are collected solely by AIST.

Method of Collection

All members of AIST; approximately 800 members of those 350 funds. Initial sample size of 20. The information was collected via a survey prepared by AIST.

Frequency

Annual.

Timeliness

Collected in December and distributed in April.

Historical Data

Data are available from 1993-94.

Geographic Breakdown

Australia. The information is not broken down by State. However data was sought from AIST members in all Australian States.

Confidentiality and Availability

The name of the participating funds is confidential. Each fund was provided with a unique identifier number which is not available to other funds.

Unpublished Information

Not available.

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Australian Investment Managers Association

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Funds Under Management Survey

Name of Organisation

Australian Investment Managers Association (AIMA)

Level 8

Challis House

4 Martin Place

SYDNEY NSW 2000

Switchboard: (02) 9221 0007

Facsimile: (02) 9221 0008

Web Site: No directory entry

Products and Services

Name/Title of Product

Funds Under Management Survey

Dissemination Media

Publication \$150.00 per issue.

Contact

About these statistics

Ms Catherine Maxwell
Executive Director
Telephone: (02) 9221 0007
To purchase these statistics
Ms Nicole Leon
Administration Manager
Telephone: (02) 9221 0007

Broad Description

A six monthly survey of funds managed by AIMA members listing source of funds and giving figures for assets in which funds are invested.

Purpose of Data

The statistics are compiled to provide a picture of the activities of AIMA's members and to improve the level of publicly available information about the investment management industry in Australia.

Detailed Description

Population

Investment management firms who are members of AIMA.

Superannuation Data Items

Market Overview:

- Sources of funds under management
- Funds under advice
- Distribution of total funds under management
- Allocation of assets under management
- Allocation of assets under management by fund type

Market Concentration. Detailed tables of sources and allocation of funds for:

- Life funds superannuation (including ADF's)
- Retail unit trust funds
- General insurance funds
- Other wholesale funds
- Other retail funds
- Funds under advice - market overview

Data recorded in billion dollar (or part thereof) units.

Source

Data are collected directly by AIMA and analysed by an independent research group.

Method of Collection

Questionnaires are sent to all AIMA members for completion. Questionnaires consist of a series of tables

completed manually. Responses are normally received from all but three or four members. Membership is approximately 61 members.

Frequency

Six monthly.

Timeliness

6-8 weeks after the reference period.

Historical Data

June 1993, December 1993, June 1994, December 1994, June 1995, December 1995, June 1996 and December 1996.

Geographic Breakdown

Australia.

Confidentiality and Availability

Not applicable.

Unpublished Information

Not available.

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Australian Retirement Income Streams Association

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Retirement Income Streams Report

Name of Organisation

Australian Retirement Income Streams Association

Level 15

15 Bent Street

SYDNEY NSW 2000

Switchboard: (02) 9251 5099

Facsimile: (02) 9251 5669

Email: jane@arisa.com.au

Products and Services

Name/Title of Product

Retirement Income Streams Report

Dissemination Media

This report is available as a publication or via email and is complimentary.

Contact

About these statistics and to purchase these statistics

Ms Jane Atkinson

Executive Secretary
Telephone: (02) 9251 5099

Broad Description

A quarterly survey which examines sales over the past three and 12 months across all classes of retirement income streams, the size of the market, the average purchase price of each type of retirement income stream and other trend data.

Purpose of Data

The statistics provide valuable information about the retirement income streams market.

Detailed Description*Population*

The report examines per person sales of retirement income streams through providers such as superannuation funds, life offices, banks and fund managers.

Superannuation Data Items

Funds under management, gross sales as a percent (in \$m and \$b) across retirement income streams, by ETP and non-ETP money sales.

Source

Statistics are compiled by Actuarial Firm Simon Solomon & Associates.

Method of Collection

As above.

Frequency

Quarterly.

Timeliness

6 weeks after the end of each quarter.

Historical Data

June 1996, September 1996, December 1996 and March 1997.

Geographic Breakdown

Australia.

Confidentiality and Availability

No restrictions.

Unpublished Information

Not available.

Confidentiality and Availability

No restrictions.

Unpublished Information

Not available.

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Australian Superannuation Practice Investment Performance Monitor

Name of Organisation

Australian Tax Practice

13-15 Lyon Park Road

NORTH RYDE NSW 2113

Switchboard: (02) 9878 0577

Facsimile: (02) 9878 0601

Web Site: http://www.thomson.com.au/tax/p_index.asp

Email: service@austaxprac.com.au

Products and Services

Name/Title of Product

Australian Superannuation Practice Investment Performance Monitor

Dissemination Media

Data are available as a publication, CD Rom, and Floppy Disk. Price on application.

Contact

About these statistics and to purchase these statistics

Mr Stuart Jones

Managing Editor
Editorial Department
Telephone: (02) 9878 0577

Broad Description

Superannuation investment funds annual returns for prior 10 years and 3 months.

Purpose of Data

Statistics are compiled to assist superannuation fund trustees in selecting and monitoring superannuation investment funds' performance. Data can also be used for the preparation of fund member reports.

Detailed Description*Population*

Superannuation investment funds.

Superannuation Data Items

Average annual returns and individual annual returns for the prior 10 years, last 3 months and year-to-date.

Returns in percent (1 decimal place) and fund size in million dollar units.

- Balanced funds
- Balanced fund quartiles
- Ranking of balanced funds
- Capital stable funds
- Capital guaranteed funds
- Equity funds
- Australian equity pooled sector funds
- Capital protected funds
- Australian fixed interest pooled sector funds
- Fixed interest (cash basis)
- International equity pooled sector funds
- International fixed interest
- Property (real) pooled sector funds
- Indices
- Volatility analysis

Source

Data are collected and prepared by Sedgewick Noble Lowndes.

Method of Collection

Unknown.

Frequency

Quarterly.

Timeliness

Data are available 6-8 weeks after the reference period.

Historical Data

Data are available for the previous 10 years.

Geographic Breakdown

Australia.

Confidentiality and Availability

Copyright is retained with Sedgwick Noble Lowndes.

Unpublished Information

Tax and superannuation legislation (complete with historical notes), cases and practitioner commentaries. Tax and superannuation rates and tables. Price on application.

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Australian Taxation Office

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Australian Government Pensions & Other Pensions, Superannuation declared

Name of Organisation

Australian Taxation Office

2 Constitution Avenue

CANBERRA CITY ACT 2601

Switchboard: (02) 6216 1111

Facsimile: (02) 6216 2844

Products and Services

Name/Title of Product

Taxation Statistics (Cat. No. 96 05525) 1994-95 Edition.

Australian Government pensions and other pensions, superannuation etc. declared.

Dissemination Media

Publication \$24.95 (includes CD Rom).

Contact

About these statistics

Mr Mark Leedham

Assistant Director

Revenue Analysis Branch

Telephone: (02) 6216 2419

Email: mark.leedham@atonat.ausgovtax.telememo.au

To purchase these statistics

Australian Government Publishing Service in each Capital City.

Broad Description

Information obtained from income tax returns.

Purpose of Data

To provide information in respect of itemised information obtained from income tax returns.

Detailed Description

Population

Statistics are obtained from income tax returns and assessments processed in the 12 months following the end of the income year.

Superannuation Data Items

Details of number of taxpayers with (i) Australian Government Pensions and other benefits, (ii) other pensions, superannuation etc, and amounts received by grade of taxable income. Data items are recorded in million dollar units.

Source

Australian Taxation Office income tax returns of individuals.

Method of Collection

Information obtained from all income tax returns and assessments processed in the 12 months following the end of the income year.

Frequency

Annual.

Timeliness

Generally published October each year (ie. approximately 18 months after the end of the income year to which the income tax returns relate).

Historical Data

Data are available from 1976-77 income year for individuals. Note that if detailed data for a particular year are required it is necessary to refer to the appropriate edition of Taxation Statistics.

Geographic Breakdown

Data are available for Australia.

Confidentiality and Availability

Data are subject to confidentiality restrictions under the secrecy provisions of the *Income Tax Assessment Act 1936*.

Unpublished Information

Generally all data available subject to the confidentiality restrictions above are published.

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Eligible Termination Payments declared

Name of Organisation

Australian Taxation Office
2 Constitution Avenue
CANBERRA CITY ACT 2601
Switchboard: (02) 6216 1111
Facsimile: (02) 6216 2844

Products and Services

Name/Title of Product

Taxation Statistics (Cat. No. 96 05525) 1994-95 Edition
Eligible Termination payments declared

Dissemination Media

Publication \$24.95 (includes CD Rom).

Contact

About these statistics

Mr Mark Leedham
Assistant Director

Revenue Analysis Branch

Telephone: (02) 6216 2419

Email: mark.leedham@atonat.ausgovtax.telememo.au

To purchase these statistics

Australian Government Publishing Service in each Capital City.

Broad Description

Information obtained from income tax returns.

Purpose of Data

To provide information in respect of itemised information obtained from income tax returns.

Detailed Description

Population

Statistics are obtained from income tax returns and assessments processed in the 12 months following the end of the income year.

Superannuation Data Items

Separate statistics are provided for eligible termination payments which are 5 per cent assessable, those taxable at concessional rates and those taxable at other rates. Data are provided by grade of taxable income, number of taxpayers with the item in million dollar units.

Source

Income tax returns of individuals.

Method of Collection

Information obtained from all income tax returns and assessments processed in the 12 months following the end of the income year.

Frequency

Annual.

Timeliness

Generally published October each year. That is about 18 months after the end of the income year to which the income tax returns relate.

Historical Data

Data are available from 1983-84 income year onwards. Note that if detailed data for a particular year are required it is necessary to refer to the appropriate edition of Taxation Statistics.

Geographic Breakdown

Data are available for Australia.

Confidentiality and Availability

Data are subject to confidentiality restrictions under the secrecy provisions of the Income Tax Assessment Act 1936 (as amended).

Unpublished Information

Generally all data available subject to the confidentiality restrictions above are published.

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Employer Superannuation Contributions Claimed by Individuals, Companies, Partnerships and Trusts

Name of Organisation

Australian Taxation Office
2 Constitution Avenue
CANBERRA CITY ACT 2601
Switchboard: (02) 6216 1111
Facsimile: (02) 6216 2844

Products and Services

Name/Title of Product

Taxation Statistics (Cat. No. 96 05525) 1994-95 Edition

Employer superannuation contributions claimed by individuals, companies, partnerships and trusts.

Dissemination Media

Publication \$24.95 (includes CD Rom)..

Contact

About these statistics

Mr Mark Leedham
Assistant Director
Revenue Analysis Branch
Telephone: (02) 6216 2419
Email: mark.leedham@atonat.ausgovtax.telememo.au

To purchase these statistics

Australian Government Publishing Service in each Capital City.

Broad Description

Information obtained from income tax returns.

Purpose of Data

To provide information in respect of itemised information obtained from income tax returns.

Detailed Description

Population

Statistics are obtained from income tax returns and assessments processed in the 12 months following the end of the income year for individuals, and assessments processed in the period 1 July 1995 to 29 September 1996 for companies, partnerships and trusts.

Superannuation Data Items

Statistics are provided for amounts allowed as deductions for contributions to superannuation funds by employers in respect of employees. Separate statistics are provided by grade of taxable income and by industry classification. The item is recorded in million dollar units.

Source

Income tax returns of individuals, companies, partnerships and trusts.

Method of Collection

Information obtained from all income tax returns and assessments processed in the 12 months following the end of the income year for individuals, and assessments processed in the period 1 July 1995 to 29 September 1996 for companies, partnerships and trusts.

Frequency

Annual.

Timeliness

Generally published October each year. That is about 18 months after the end of the income year to which the income tax returns relate.

Historical Data

Data are available from 1992-93 for individuals, from 1989-90 income year for partnerships and trusts, and from 1969-70 for companies. Note that if detailed data for a particular year are required it is necessary to refer to the appropriate edition of Taxation Statistics.

Geographic Breakdown

Data are available for Australia.

Confidentiality and Availability

Data are subject to confidentiality restrictions under the secrecy provisions of the Income Tax Assessment Act 1936 (as amended).

Unpublished Information

Generally all data available subject to the confidentiality restrictions above are published.

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Income Tax Returns of Superannuation Funds, Approved Deposit Funds and Pooled Individuals claiming superannuation contribution rebates

Name of Organisation

Australian Taxation Office
2 Constitution Avenue
CANBERRA CITY ACT 2601
Switchboard: (02) 6216 1111
Facsimile: (02) 6216 2844

Products and Services

Name/Title of Product

Taxation Statistics (Cat. No. 96 05525) 1994-95 Edition

Income tax returns of superannuation funds, approved deposit funds and pooled superannuation trusts.

Dissemination Media

Publication \$24.95 (includes CD Rom).

Contact

About these statistics

Mr Mark Leedham
Assistant Director
Revenue Analysis Branch
Telephone: (02) 6216 2419
Email: mark.leedham@atonat.ausgovtax.telememo.au

To purchase these statistics

Australian Government Publishing Service in each Capital City.

Broad Description

Information obtained from income tax returns.

Purpose of Data

To provide information in respect of itemised information obtained from income tax returns.

Detailed Description

Population

Statistics are obtained from income tax returns and assessments of superannuation funds, approved deposit funds and pooled superannuation trusts processed from 1 July 1995 to 29 September 1996.

Superannuation Data Items

Separate statistics are provided by grade of net tax, grade of taxable income and grade of total income. The items are recorded in million dollar units.

Source

Income tax returns of superannuation funds and pooled superannuation trusts.

Method of Collection

Information obtained from all income tax returns and assessments processed in the period 1 July 1995 to 29 September 1996.

Frequency

Annual.

Timeliness

Generally published October each year. That is about 18 months after the end of the income year to which the income tax returns relate.

Historical Data

Data are available from 1989-90 income year onwards. Note that if detailed data for a particular year are

required it is necessary to refer to the appropriate edition of Taxation Statistics.

Geographic Breakdown

Data are available for Australia.

Confidentiality and Availability

Data are subject to confidentiality restrictions under the secrecy provisions of the Income Tax Assessment Act 1936 (as amended).

Unpublished Information

Generally all data available subject to the confidentiality restrictions above are published.

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Individuals claiming superannuation contributions rebate

Name of Organisation

Australian Taxation Office
2 Constitution Avenue
CANBERRA CITY ACT 2601
Switchboard: (02) 6216 1111
Facsimile: (02) 6216 2844

Products and Services

Name/Title of Product

Taxation Statistics (Cat. No. 96 05525) 1994-95 Edition.
Individuals claiming superannuation contributions rebate.

Dissemination Media

Publication \$24.95 (includes CD Rom).

Contact

About these statistics

Mr Mark Leedham
Assistant Director

Revenue Analysis Branch

Telephone: (02) 6216 2419

Email: mark.leedham@atonat.ausgovtax.telememo.au

To purchase these statistics

Australian Government Publishing Service in each Capital City.

Broad Description

Information obtained from income tax returns.

Purpose of Data

To provide information in respect of itemised information obtained from income tax returns.

Detailed Description

Population

Statistics are obtained from income tax returns and assessments processed in the 12 months following the end of the income year.

Superannuation Data Items

Details of number of taxpayers claiming superannuation contribution rebate and amounts claimed by grade of taxable income. The item is recorded in million dollar units.

Source

Income tax returns of individuals.

Method of Collection

Information obtained from all income tax returns and assessments processed in the 12 months following the end of the income year.

Frequency

Annual.

Timeliness

Generally published October each year. That is about 18 months after the end of the income year to which the income tax returns relate.

Historical Data

Data are available from 1990-91 income year for individuals. Note that if detailed data for a particular year are required it is necessary to refer to the appropriate edition of Taxation Statistics.

Geographic Breakdown

Data are available for Australia.

Confidentiality and Availability

Data are subject to confidentiality restrictions under the secrecy provisions of the Income Tax Assessment Act 1936 (as amended).

Unpublished Information

Generally all data available subject to the confidentiality restrictions above are published.

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Superannuation contributions claimed by persons not covered by an employer sponsored superannuation fund

Name of Organisation

Australian Taxation Office
2 Constitution Avenue
CANBERRA CITY ACT 2601
Switchboard: (02) 6216 1111
Facsimile: (02) 6216 2844

Products and Services

Name/Title of Product

Taxation Statistics (Cat. No. 96 05525) 1994-95 Edition.

Superannuation contributions claimed by persons not covered by an employer sponsored superannuation fund.

Dissemination Media

Publication \$24.95 (includes CD Rom).

Contact

About these statistics

Mr Mark Leedham

Assistant Director

Revenue Analysis Branch

Telephone: (02) 6216 2419

Email: mark.leedham@atonat.ausgovtax.telememo.au

To purchase these statistics

Australian Government Publishing Service in each Capital City.

Broad Description

Information obtained from income tax returns.

Purpose of Data

To provide information in respect of itemised information obtained from income tax returns.

Detailed Description

Population

Statistics are obtained from income tax returns and assessments processed in the 12 months following the end of the income year.

Superannuation Data Items

Details of number of taxpayers claiming deductions for superannuation contributions to non-employer sponsored superannuation funds and amounts claimed by grade of taxable income. The item is recorded in million dollar units.

Source

Income tax returns of individuals.

Method of Collection

Information obtained from all income tax returns and assessments processed in the 12 months following the end of the income year.

Frequency

Annual.

Timeliness

Generally published October each year. That is about 18 months after the end of the income year to which the income tax returns relate.

Historical Data

Data are available from 1980-81 Income year onwards. Note that if detailed data for a particular year are required it is necessary to refer to the appropriate edition of Taxation Statistics.

Geographic Breakdown

Data are available for Australia.

Confidentiality and Availability

Data are subject to confidentiality restrictions under the secrecy provisions of the Income Tax Assessment Act 1936 (as amended).

Unpublished Information

Generally all data available subject to the confidentiality restrictions above are published.

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BIS Shrapnel

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New Zealand Superannuation Survey

Name of Organisation

BIS Shrapnel

Level 8

181 Miller Street

NORTH SYDNEY NSW 2060

Switchboard: (02) 9959 5924

Facsimile: (02) 9959 5795

Web Site: <http://www.bis.com.au>

Products and Services

Name/Title of Product

New Zealand Superannuation Survey

Dissemination Media

Publication \$6,500.00.

Contact

About these statistics and to purchase these statistics

Mr Geoff Ludowyke

Head of Financial Services

Telephone: (02) 9959 5924

Broad Description

Survey of 175 superannuation schemes analysing their views on investment managers, administrators, asset consultants, actuaries and superannuation consultants.

Purpose of Data

To provide benchmarks for all service providers of superannuation and pension related services.

Detailed Description

Population

175 Superannuation funds. 50% had assets in excess of \$2m.

Superannuation Data Items

Performance of six major administrators and superannuation consultants. Performance of eleven major investment managers. Performance of five major actuarial firms.

Source

Data are collected directly by BIS Shrapnel.

Method of Collection

Mailed questionnaire and direct contact if necessary.

Frequency

Annual.

Timeliness

Data collected in August and September are available in December.

Historical Data

1994 and 1996.

Geographic Breakdown

National.

Confidentiality and Availability

No restrictions but no source identified.

Unpublished Information

Unpublished information is available. Price on application.

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Wholesale Superannuation Investment Survey

Name of Organisation

BIS Shrapnel

Level 8

181 Miller Street

NORTH SYDNEY NSW 2060

Switchboard: (02) 9959 5924

Facsimile: (02) 9959 5795

Web Site: <http://www.bis.com.au>

Products and Services

Name/Title of Product

Wholesale Superannuation Investment Survey

Dissemination Media

Publication \$10,000.00.

Contact

About these statistics and to purchase these statistics

Mr Geoff Ludowyke

Head of Financial Services
Telephone: (02) 9959 5924

Broad Description

Results of a survey of 275 superannuation funds using wholesale investment products. Government, industry and corporate funds are covered. The analysis covers service standards of investment manager, asset consultants and custodians.

Purpose of Data

The report establishes and monitors the change in benchmarks for the funds management industry. It identifies the drivers for decisions on investments as well as the unmet needs of trustees. The data can also be used to monitor the success of marketing strategies.

Detailed Description*Population*

275 superannuation funds each with assets greater than \$500,000.

Superannuation Data Items

Performance of 13 major investment managers in relation to reporting, communication, investment team, marketing team, and presentations. Ranking criteria for entry to a short list. Ranking criteria for selection from a short list. Preferred fee structures. Asset allocation, asset classes in \$m. Investment structures, balanced and sector pools in \$m.

Source

Data are collected directly by BIS Shrapnel.

Method of Collection

Surveys prior to 1997 compiled by mailed questionnaires. 1997 Survey to be conducted by telephone interview.

Frequency

Annual.

Timeliness

Subscribers receive preliminary results in November and a final report in December. Report may be purchased at a premium fee from 1 February 1998.

Historical Data

Data are available for the previous 7 years.

Geographic Breakdown

National.

Confidentiality and Availability

No restrictions but no source identified.

Unpublished Information

Unpublished information is available. Price on application.

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Insurance and Superannuation Commission

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Insurance and Superannuation Commission Bulletin

Name of Organisation

Insurance and Superannuation Commission

GPO Box 9836

CANBERRA ACT 2601

Switchboard: (02) 6247 2299

Facsimile: (02) 6213 5100

Web Site: <http://www.superannuation.asn.au/>

Email: resrchxin@isc.gov.au

Products and Services

Name/Title of Product

Insurance and Superannuation Commission Bulletin

Dissemination Media

Publication \$50.00 per issue or \$175.00 pa.

Contact

About these statistics and to purchase these statistics

Mr Alex Dunnin

Research Director
Statistics and Research Unit
Telephone: (02) 6213 5381

Broad Description

Analysis of the superannuation industry, including statistical information, strategic analysis and major ISC comments.

Purpose of Data

To provide an accurate and up-to-date description of Australia's superannuation industry.

Detailed Description*Population*

Superannuation funds, investment managers and life office statutory funds.

Superannuation Data Items

- Funds
- Membership
- Assets under management
- Asset allocation
- Contributions
- Benefits

Source

ISC Quarterly Survey of Superannuation and ISC Superannuation annual returns. Analysis contained in articles may be sourced from various other sources.

Method of Collection

Surveys of major super funds, including adhoc surveys of major market segments.
Annual return data are sourced from a population census of SIS regulated funds.

Frequency

Quarterly.

Timeliness

3 months after the reference period.

Historical Data

Available from June 1995.

Geographic Breakdown

Australia and Australian States for demographics.

Confidentiality and Availability

ISC secrecy provisions apply.

Unpublished Information

Unpublished information on life insurance is available on request subject to ISC secrecy provisions. Price on application.

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InTech Asset Consulting Pty Ltd

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[InTech Corporate Superannuation Digest](#)

[InTech Investment Manager Commentary](#)

[InTech Sector Performance Survey](#)

[InTech Survey of Pooled Superannuation Funds](#)

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InTech Asset Allocation Monthly

Name of Organisation

InTech Asset Consulting Pty Ltd

Level 5

345 George Street

SYDNEY NSW 2000

Switchboard: (02) 9290 1121

Facsimile: (02) 9290 1550

Email: InTech@mpx.com.au

Products and Services

Name/Title of Product

InTech Asset Allocation Monthly

Dissemination Media

Publication \$2,000.00 pa.

Contact

About these statistics and to purchase these statistics

Mr Ron Lawton

Associate Director
Telephone: (02) 9290 1121

Broad Description

Published monthly, the service provides the latest asset allocations for market-linked and capital stable pooled superannuation funds.

Purpose of Data

To monitor the tactical asset allocation changes of fund managers for their pooled funds.

Detailed Description*Population*

Corporate market-linked and capital stable pooled funds.

Superannuation Data Items

Published monthly, this service provides the most detailed and fastest asset allocation data available in respect of the major market-linked and capital stable pooled superannuation funds. The service includes the faxing of the main details immediately upon compilation and the mailing of the full publication the next day. A monthly diskette containing the main asset allocation details is also provided enabling subscribers to perform their own analysis.

Source

Collected by InTech from the participating fund managers.

Method of Collection

Standard monthly forms.

Frequency

Monthly.

Timeliness

Released on the 12th day following the month end.

Historical Data

Data in publication includes annual comparisons.

Geographic Breakdown

Fund managers offering pooled superannuation funds in Australia.

Confidentiality and Availability

No confidentiality restrictions apply.

Unpublished Information

Not available.

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InTech Corporate Superannuation Digest

Name of Organisation

InTech Asset Consulting Pty Ltd

Level 5

345 George Street

SYDNEY NSW 2000

Switchboard: (02) 9290 1121

Facsimile: (02) 9290 1550

Email: InTech@mpx.com.au

Products and Services

Name/Title of Product

InTech Corporate Superannuation Digest

Dissemination Media

Publication \$2,000.00 pa.

Contact

About these statistics and to purchase these statistics

Mr Ron Lawton

Associate Director
Telephone: (02) 9290 1121

Broad Description

Summarised details of Australia's institutional pooled superannuation funds.

Purpose of Data

To summarise a wide range of information on the pooled superannuation funds being offered.

Detailed Description*Population*

Corporate market-linked and capital stable superannuation providers.

Superannuation Data Items

Published quarterly, the digest provides comprehensive data of historical and current information on the major pooled superannuation funds including fees, tax status, termination provisions, fund size, buy/sell spreads, detailed performance figures, risk adjusted performance and volatility studies, dynamic risk/return graphics, current and historical asset allocations, asset allocation benchmarks and ranges and other asset allocation studies.

Source

Collected by InTech from the participating funds.

Method of Collection

Standard quarterly forms.

Frequency

Quarterly.

Timeliness

Released 30 days after the end of the quarter.

Historical Data

Information covers period back 5 years.

Geographic Breakdown

Australian pooled super funds.

Confidentiality and Availability

No confidentiality restrictions apply.

Unpublished Information

Not available.

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InTech Investment Manager Commentary

Name of Organisation

InTech Asset Consulting Pty Ltd

Level 5

345 George Street

SYDNEY NSW 2000

Switchboard: (02) 9290 1121

Facsimile: (02) 9290 1550

Email: InTech@mpx.com.au

Products and Services

Name/Title of Product

InTech Investment Manager Commentary

Dissemination Media

Publication \$5,000.00 pa.

Contact

About these statistics and to purchase these statistics

Mr Ron Lawton

Associate Director
Telephone: (02) 9290 1121

Broad Description

A qualitative document covering the investment style and process of Australia's institutional fund managers.

Purpose of Data

To provide an accurate description of how Australian fund managers undertake investment in each of the major asset classes.

Detailed Description*Population*

Australia's institutional funds management organisations.

Superannuation Data Items

The commentary, which is updated progressively during the year, provides a description of the investment process and style of Australia's institutional fund managers.

Source

Information provided by each of the funds management organisations and compiled by InTech.

Method of Collection

Initially by completion of an InTech questionnaire by each funds management organisation.

Frequency

Progressively during the year with each funds management organisation being updated annually.

Timeliness

Progressively during the year.

Historical Data

Not available.

Geographic Breakdown

Australian based institutional funds management organisations.

Confidentiality and Availability

No confidentiality restrictions apply.

Unpublished Information

Further customised research is available, on request.

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InTech Sector Performance Survey

Name of Organisation

InTech Asset Consulting Pty Ltd

Level 5

345 George Street

SYDNEY NSW 2000

Switchboard: (02) 9290 1121

Facsimile: (02) 9290 1550

Email: InTech@mpx.com.au

Products and Services

Name/Title of Product

InTech Sector Performance Survey

Dissemination Media

Publication \$1,500.00 pa.

Contact

About these statistics and to purchase these statistics

Mr Ron Lawton

Associate Director
Telephone: (02) 9290 1121

Broad Description

An investment performance survey of specialist sector funds and the sectors of diversified pooled funds.

Purpose of Data

A performance survey to monitor the sector performance of Australia's institutional fund managers.

Detailed Description*Population*

Corporate sector funds of fund managers.

Superannuation Data Items

Published monthly, this survey provides sector performance details of the major wholesale fund managers. Both sector specialist funds and sector components of diversified funds are analysed, covering the sectors of Australian shares, offshore shares, Australian fixed interest, offshore fixed interest, listed property and direct property. In addition, the sector specialist funds segment of the survey also covers passive Australian shares, small companies, passive offshore shares, global small companies, inflation linked securities, cash and cash enhanced. The survey includes risk/return analyses. Quarterly editions of the survey look at both sector specialist funds and sector components of diversified funds. Monthly editions of the survey cover sector specialist funds only.

Source

Collected by InTech from the participating funds.

Method of Collection

Standard monthly forms.

Frequency

Monthly.

Timeliness

Released on the 30th day following the month end.

Historical Data

Data in publication goes back 5 years.

Geographic Breakdown

Australian and international based fund managers offering sector investment funds in Australia.

Confidentiality and Availability

No confidentiality restrictions apply.

Unpublished Information

Not available.

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InTech Survey of Pooled Superannuation Funds

Name of Organisation

InTech Asset Consulting Pty Ltd

Level 5

345 George Street

SYDNEY NSW 2000

Switchboard: (02) 9290 1121

Facsimile: (02) 9290 1550

Email: InTech@mpx.com.au

Products and Services

Name/Title of Product

InTech Survey of Pooled Superannuation Funds.

Dissemination Media

Publication \$300.00 pa mailed (faxed \$600.00).

Contact

About these statistics and to purchase these statistics

Mr Ron Lawton

Associate Director
Telephone: (02) 9290 1121

Broad Description

An investment performance survey of diversified pooled superannuation funds offered by institutional fund managers.

Purpose of Data

A performance survey to monitor the performance of pooled superannuation funds offered by institutional fund managers.

Detailed Description*Population*

Corporate market-linked and capital stable pooled funds.

Superannuation Data Items

Net (after tax and fees) rates of returns over the following periods - one month, 3 months, 1 year to 10 years inclusive. Size of investment pool of each fund, total funds under management, tax status of fund as well as risk and return charts for a 3 year period. A performance commentary for the month is also included.

Source

Collected by InTech from the participating fund managers.

Method of Collection

Standardised monthly forms.

Frequency

Monthly.

Timeliness

Released on the 13th day following the month end.

Historical Data

Data in publication goes back 10 years.

Geographic Breakdown

Australia.

Confidentiality and Availability

No confidentiality restrictions apply.

Unpublished Information

Customised research is also available, through negotiation.

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Jacques Martin Administration and Consulting Pty Ltd

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Fund Choice Survey

Name of Organisation

Jacques Martin Administration and Consulting Pty Ltd
365 Little Collins Street,
Melbourne, VIC, 3000
Switchboard: (03) 9200 1777
Facsimile: (03) 9200 1707

Products and Services

Name/Title of Product

Fund Choice Survey

Dissemination Media

Publication Price on application

Contact

Annette King
National Consulting Manager
Telephone: 1800 815 903 or (03) 9200 1734

Broad Description

Results of a survey of attitudes to Fund Choice of 182 employers and superannuation funds providers including corporate funds, employers, industry funds, public offer funds, public sector funds and RSA providers.

Purpose of Data

The survey reports on industry responses to the Government's proposed introduction of Fund Choice legislation. The results provide feedback on reactions/opinions of peers and competitors and have been communicated to the Government and the ATO.

Detailed Description Population

117 employers, some with/some without corporate superannuation funds 29 public offer funds 21 industry funds 15 other

Superannuation Data Items

Awareness of Fund Choice Employer Strategies proposed in response ie. proportions considering Workplace Agreements, 4 choices, unlimited choices. Estimates of effects on the superannuation market Preferred implementation dates Competitive issues fund providers face ie. who is reviewing fees, distribution, benefit features, investment options, etc. Attitudes to education of employees/members Level of employer liability envisaged Attitudes to selection of default funds. General attitude to the concept Level of employer liability envisaged Attitudes to selection of default funds General attitude to the concept of Fund Choice Level of expertise/reliance on expert outside assistance Attitudes to "Clearing House" concept Effect on insurance Effect on fees and other costs Impact on membership of existing fund ie. movement in and out of funds

Source

Data was collected directly by Jacques Martin Administration and Consulting Pty Ltd.

Method of collection

Combination of a mailed questionnaire and personal interviews (30-40 interviews with large employers and large fund providers, remainder mailed).

Frequency

Irregularly - to date one survey has been completed. Another is scheduled once the legislation is final.

Timeliness

N/A

Historical Data

N/A

Geographic Breakdown

National. Specific geographic breakdown can be provided. Other breakdowns of statistics can also be provided, eg. Fund type, size of employer.

Level of confidentiality/Availability

No restrictions but no source identified. Survey results provided free-of-charge to participants, others will incur a charge of \$200.

Unpublished Information

Yes (see Question 12 above).

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LIMRA International

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Financial Product Ownership Survey

Name of Organisation

LIMRA International

Level 9

2 Elizabeth Plaza

NORTH SYDNEY NSW 2060

Switchboard: (02) 9929 4955

Facsimile: (02) 9922 6791

Web Site: www.limra.com

Email: 100242.622@compuserve.com

Products and Services

Name/Title of Product

Financial Product Ownership Survey

Dissemination Media

Publication. Price on application.

Contact

About these statistics and to purchase these statistics

Ms Ingrid Selene
Regional Director
Strategic Resources
Telephone: (02) 9929 4955

Broad Description

Measures the level of financial product ownership in the community in relation to overall financial situation. Details are collected on all products owned, attitudes to financial matters, demographic and financial characteristics.

Purpose of Data

To provide a benchmark measure of Australian's financial product ownership and to explore factors influencing the ownership of such financial products.

Detailed Description*Population*

Income units within households, individual members of the income unit.

Superannuation Data Items

- Number and type of superannuation products owned
- Product features
- Company the superannuation product is with
- Annual contributions
- Current value
- Years owned and intended to keep
- Reasons for buying
- Likelihood of buying in the future
- Financial goals
- Total assets
- Debts and monthly repayments
- Age intended to retire
- Source of income after retirement
- Demographic details and attitudinal issues

Source

Data are collected by an independent research company.

Method of Collection

Face to face interviews with representatives of 500 income units. Sample of households selected randomly.

Frequency

Irregular.

Timeliness

To be published in 1997.

Historical Data

Not available.

Geographic Breakdown

Five major cities (Sydney, Melbourne, Brisbane, Perth and Adelaide).

Confidentiality and Availability

Full report generally only available to LIMRA member companies. Aggregate statistics may be made available to other organisations on request.

Unpublished Information

Additional data may be available on request.

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Industry Census of Sales and Distribution Channels

Name of Organisation

LIMRA International

Level 9

2 Elizabeth Plaza

NORTH SYDNEY NSW 2060

Switchboard: (02) 9929 4955

Facsimile: (02) 9922 6791

Web Site: www.limra.com

Email: 100242.622@compuserve.com

Products and Services

Name/Title of Product

Industry Census of Sales and Distribution Channels: 1995-96.

Dissemination Media

Publication. Price on application.

Contact

About these statistics and to purchase these statistics

Ms Ingrid Selene
Regional Director
Strategic Resources
Telephone: (02) 9929 4955

Broad Description

Census of life insurers and fund managers that measures financial product sales and sales personnel during the financial year 1995-96 by type of product and distribution channel used.

Purpose of Data

To provide baseline statistics on industry sales and distribution channel structure. The census will be repeated at regular intervals to track trends.

Detailed Description

Population

Life insurance companies, investment managers, bank assurances and friendly societies.

Superannuation Data Items

- Amount of contributions from new business sales (\$m) by type of product.
- Amounts of all contributions from new and existing business (\$m) by type of product.
- Type of adviser/distribution channel through which new business sales were made by type of product.

Source

Questionnaires designed by LIMRA and distributed by financial service industry associations.

Method of Collection

Completed questionnaires received from 34 companies which represent 80% of the ISC-regulated single contribution business, 90% of the ISC-regulated regular contribution business, 50% of all IFA companies and 20% of assets held by friendly societies.

Frequency

Expected to be annually.

Timeliness

Future reports will cover the calendar (not financial) year. Results are available four to six months after the reference period.

Historical Data

The 1995-96 study was the first in what will be an annual survey.

Geographic Breakdown

Australia.

Confidentiality and Availability

Full report generally only available to participating companies. Summary statistics may be made available to other organisations on request. Data on individual companies not available due to confidentiality restrictions.

Unpublished Information

Additional data may be available on request.

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Public Perceptions of Financial Institutions and Intermediaries

Name of Organisation

LIMRA International

Level 9

2 Elizabeth Plaza

NORTH SYDNEY NSW 2060

Switchboard: (02) 9929 4955

Facsimile: (02) 9922 6791

Web Site: www.limra.com

Email: 100242.622@compuserve.com

Products and Services

Name/Title of Product

Public Perceptions of Financial Institutions and Intermediaries.

Dissemination Media

Publication. Price on application.

Contact

About these statistics and to purchase these statistics

Ms Ingrid Selene
Regional Director
Strategic Resources
Telephone: (02) 9929 4955

Broad Description

Consumers' recent purchases of financial products, purchasing behaviour, contacts with and perceptions of financial institutions and intermediaries.

Purpose of Data

To identify comparative perceptions of financial institutions and intermediaries and to investigate how these relate to purchasing behaviour.

Detailed Description

Population

Financial decision makers in households.

Superannuation Data Items

- Superannuation ownership
- Products purchased in the last three years
- Sources of advice for purchases
- Channel through which product purchased
- Factors influencing choice of intermediary and choice of company
- Quality of service
- Public image of financial institutions and intermediaries.

Source

Data collected by an independent research company.

Method of Collection

Face to face interview with representatives of 500 randomly selected households.

Frequency

Irregular.

Timeliness

Not applicable.

Historical Data

Last published in 1994.

Geographic Breakdown

Five major capital cities (Sydney, Melbourne, Brisbane, Adelaide and Perth).

Confidentiality and Availability

Aggregate statistics may be made available on request.

Unpublished Information

Additional data may be available on request.

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Melbourne Institute of Applied Economic and Social Research (University of Melbourne)

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Household Savings Report

Melbourne Institute Household Savings Report

Name of Organisation

Melbourne Institute of Applied Economic and Social Research
University of Melbourne
PARKVILLE VIC 3052

Telephone: (03) 9344 5325

Facsimile: (03) 9344 5630

Products and Services

Name/Title of Product

Melbourne Institute Household Savings Report

Dissemination media

Hard copy. Arrangements for faxed copy can be made. Cost \$175 per year (4 reports).

Contact

About these statistics and to purchase these statistics

Ms Rachel Derham

Telephone: (03) 9344 5325

Email: r.derham@iaesr.unimelb.edu.au

Broad Description

Collects qualitative data on households assessed forms of savings, reasons for savings, main forms of debt, financial situation of household and view on the best place to place new savings. Data can be broken down by sex, age, household income, occupation, educational attainment, voting intentions, household size, number of children in household.

Purpose of Data

Public information.

Detailed Description

Population

1200 householders per survey

Superannuation Data Items

- Householders are asked what are their main form of savings (prompts are given).
- Those who nominate superannuation are asked whether it is an employer based scheme, personal superannuation or a do-it-yourself scheme.
- Householders are asked to nominate what they believe is the best form of savings (prompts are given including for superannuation).
- Householders are asked for their main reasons for saving (prompts are given including retirement).
- Other information on debt is also collected.

Source

Stratified survey of households across Australia.

Method of Collection

Telephone interview.

Frequency

Quarterly.

Timelines

One week.

Historical Data

Report contains two years data. Data has been collected since May 1993. The full series is available on request.

Geographic Breakdown

Available by state and metro/non metro. Geographic breakdowns are not presented in the standard report but can be undertaken as a special request.

Confidentiality and Availability

Not confidential.

Unpublished Information

Full unit record data is available for every survey since inception (May 1993). This includes background demographic data.

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Mintel Australia Pty Ltd

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Superannuation and Savings Plans

Name of Organisation

Mintel Australia Pty Ltd
Level 4
14 Collins Street
MELBOURNE VIC 3000
Switchboard: (03) 9654 4266
Facsimile: (03) 9650 7730

Products and Services

Name/Title of Product

Superannuation and Savings Plans

Dissemination Media

Publication \$18,300.00 and Corporate Subscription \$33,813.00.

Contact

About these statistics

Mr Brent Hughes
Research Director

Telephone: (03) 9654 4266

To purchase these statistics

Mr Tony Kendall

Marketing Assistant

Telephone: (03) 9654 4266

Broad Description

Primary research of fund managers budget retail super product providers. Secondary research of schedules and company records. Consumer research of retail super products' attribute importance by company.

Purpose of Data

As a base for industry intelligence and industry and competitor viability assessment and forecasts.

Detailed Description

Population

Superannuation fund managers, including the managers of the superannuation funds of the top 100 companies, managers representing 95 percent of public sector superannuation funds and managers of all major institutional funds.

Superannuation Data Items

This report provides an analysis of the superannuation industry and selected retail superannuation products (e.g. Master Trusts, Super Bonds, Super Plans and DIY super). It also provides extensive product distribution and performance, market share analysis including forecasts for future growth.

Source

Major reliance is placed on primary research undertaken by Mintel. Secondary research and international research are also used.

Method of Collection

Several methodologies are used. These include superannuation traces; telephone product attribute survey; delphi studies of industry participants; and field collections of fund manager and planner sales patterns. In addition, 95% of the public sector population are interviewed and 100 companies are canvassed to represent the corporate sector.

Frequency

Annual.

Timeliness

12 months after the reference period.

Historical Data

Data are available since 1981.

Geographic Breakdown

Australia; selected analysis by region.

Confidentiality and Availability

Readily available on subscription.

Unpublished Information

Access to raw data can be obtained. Price on application.

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Member Investment Choice

Name of Organisation

MJR Consultants

16 The Avenue

HURSTVILLE NSW 2220

Switchboard: (02) 9580 8566

Facsimile: (02) 9580 0778

Web Site: www.mjr.com.au/-consults

Email: consults@mjr.com.au

Products and Services

Name/Title of Product

Member Investment Choice

Insurance in Superannuation

Dissemination Media

Publication: \$99.00 per issue

Contact

About these statistics

Mr Michael Rice
Managing Director
Telephone: (02) 9580 8566
To purchase these statistics
Ms Marina Kacjinovska
Personal Assistant
Telephone: (02) 9580 8566

Broad Description

Reports analysing the key issues providing trustees and other interested parties with all the arguments for and against member investment choice and insurance in superannuation.

Purpose of Data

Specialist research targeted towards trustees and other interested parties.

Detailed Description

Population

Not Applicable.

Superannuation Data Items

- Member Investment Choice (published April 1995, to be updated in November 1997) is written in simple terms and contains over 100 pages analysing the key issues and is intended to provide trustees and other interested parties with all of the arguments for and against Member Investment Choice. It sets out the strategic and practical issues which face the industry, supported by market analysis tables.
- Insurance in Superannuation (published December 1996) review trends in insurance arrangements for various types of super funds.

Source

Collected directly by MJR Consultants

Method of Collection

Not Applicable.

Frequency

Ad-hoc.

Timeliness

Not Applicable.

Historical Data

Not applicable.

Geographic Breakdown

Not applicable.

Confidentiality and Availability

Readily available.

Unpublished Information

Can be made available on a fee for service basis.

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Plan for Life Pty Ltd (Simon Solomon & Associates)

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Immediate Annuity Report

Name of Organisation

Plan for Life Pty Ltd (Simon Solomon and Associates)

8 Birch Street

MT WAVERLEY VIC 3149

Switchboard: (03) 9807 7482

Facsimile: (03) 9807 8160

Email: planforlife@planforlife.com.au

Products and Services

Name/Title of Product

Immediate Annuity Report

Dissemination Media

Publication \$395.00 per issue.

Contact

About these statistics and to purchase these statistics

Mr Simon Solomon

Managing Director

Telephone: (03) 9807 7482

Broad Description

Data on immediate annuities.

Purpose of Data

Statistics are used as a reference manual for examining the different products sold by Australian Life Insurance companies and monitoring sale of immediate annuities each quarter.

Detailed Description

Population

Immediate annuity products and quarterly sales of business by number of cases and dollar amounts. Total market covered.

Superannuation Data Items

Compilation of Australian immediate annuity products and quarterly sales by company (million dollar units).

Source

Collected directly by Simon Solomon & Associates.

Method of Collection

Complete enumeration.

Frequency

Quarterly.

Timeliness

Within three months of the reference period.

Historical Data

Data available from 1989 to 1997 inclusive.

Geographic Breakdown

Australia.

Confidentiality and Availability

Not applicable.

Unpublished Information

Specific reports and analyses available on request. It is expected that future publications will also be available on CD Rom and disk.

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Australian Institutional Marketing Directory

Name of Organisation

Rainmaker Information Services Pty Ltd

Level 2

63 York Street

SYDNEY NSW 2000

Switchboard: (02) 9290 3488

Facsimile: (02) 9290 3499

Email: rm@rainmaker.com.au

Products and Services

Name/Title of Product

Australian Institutional Marketing Directory

Dissemination Media

Available as a software package in FileMaker Pro 3.0 (Claris International). Initial establishment fee of \$A12,500 and \$10,000 pa for electronic updates. Hardcopy reports are included and provided on a quarterly basis.

Contact

About these statistics and to purchase these statistics

Mr Christopher Page

Chief Executive

Telephone: (02) 9290 3488

Broad Description

A database providing comprehensive information on over 2,190 superannuation funds, 68 Government non-superannuation funds and over 420 wholesale investment consultants. Rainmaker also includes information on over 800 investment managers, charities, foundations and institutions.

Purpose of Data

On an interactive basis, the database allows information to be used to perform analysis of the superannuation and investment management industries. The database can be used by both investment managers and superannuation funds to gain a better understanding of individual funds as well as market trends, size and growth. In addition, superannuation funds can use the database to develop benchmarks.

Detailed Description

Population

Superannuation funds across all industries, investment managers, institutions and consultants.

Superannuation Data Items

Fund size, account status reports (including fund mandates and assets held), key contact reports, specialised reports and press files.

Source

Data collection is on a systematic basis, sourced from both primary and secondary sources. This includes meetings on a one to one basis for accounts over \$100 million, collection of annual reports, market surveys as well as other secondary sources.

Method of Collection

Several methodologies used.

Frequency

Ongoing.

Timeliness

Electronic updates are provided to clients every two months.

Historical Data

Available on various accounts up to ten years.

Geographic Breakdown

Australia and all States and Territories.

Confidentiality and Availability

Not applicable.

Unpublished Information

Specialised reports can be produced for clients on request. Price on application.

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Super Review

Name of Organisation

Reed Business Information

47 Chippen Street

CHIPPENDALE NSW 2008

Switchboard: (02) 9699 2411

Facsimile: (02) 9319 7926

Products and Services

Name/Title of Product

Super Review

Dissemination Media

Publication \$9.55 per issue or \$105.00 pa in Australia only.

Contact

About these statistics and to purchase these statistics

Ms Linda Drake

Editor

Super Review

Telephone: (02) 9318 4711

Broad Description

Monthly publication dedicated to wholesale super industry with regular news, views and round-up of products, providers, conferences, seminars etc; regular surveys and listings of various specialist service providers to wholesale super industry, e.g. fund managers, industry funds, insurers, administrators and software services.

Purpose of Data

For information/education of trustees and secretaries of super funds.

Population

Various sources; see Broad Description.

Superannuation Data Items

Information varies according to nature of listing, but generally consists of name of firm, address and phone number, contact name and description of services/products.

Source

Data are generally collected directly.

Method of Collection

Generally collected by questionnaire directed to the source. Aim to cover 95-100% of the particular market or sub sector thereof.

Frequency

Most surveys/listings are conducted annually.

Timeliness

Approximately 2 months after the reference period.

Historical Data

Only to the extent of existence or otherwise of backnumbers.

Geographic Breakdown

Australia wide.

Confidentiality and Availability

Respondents implicitly agree to publication by responding.

Unpublished Information

Not applicable.

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Super Review Top 1500 Superannuation Funds

Name of Organisation

Reed Business Information

47 Chippen Street

CHIPPENDALE NSW 2008

Switchboard: (02) 9699 2411

Facsimile: (02) 9319 7926

Products and Services

Name/Title of Product

Super Review Top 1500 Superannuation Funds

Dissemination Media

Software package \$3,350.00 (including a hardcopy printout).

Contact

About these statistics and to purchase these statistics

Ms Linda Drake

Editor

Super Review

Telephone: (02) 9318 4711

Broad Description

Listing of name, address, phone number, fund secretary, board of trustees, fund sector, type of fund, year started, number of members, asset value (\$m) investment profile, investment returns and service providers.

Purpose of Data

A database for service providers to access the super fund market.

Population

Superannuation funds across all sectors.

Superannuation Data Items

See Broad Description.

Source

Data are collected directly from superannuation funds.

Method of Collection

Questionnaire to source. About 1% numerically of all superannuation funds including 'Excluded' funds, but about 30% in asset value terms.

Frequency

Annual.

Timeliness

Approximately 6 months after the reference period.

Historical Data

Data are also available for 1995 and 1996.

Geographic Breakdown

Australia, State and Postcode.

Confidentiality and Availability

Respondents implicitly agree to public availability of information tendered.

Unpublished Information

Not available for Australia.

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Australian Economic Statistics 1949-50 to 1994-95

Name of Organisation

Reserve Bank of Australia

GPO Box 3947

SYDNEY NSW 2001

Switchboard: (02) 9551 8000

Facsimile: (02) 9221 5528

Web Site: <http://www.rba.gov.au/>

Products and Services

Name/Title of Product

Australian Economic Statistics 1949-50 to 1994-95 (to 1995-96 for disks).

Dissemination Media

Publication \$25.00 per issue (\$30.00 mailed). Also available on floppy disk \$25.00 each (\$30.00 mailed). The floppy disk contains data only, with minimal labelling/description.

Contact

About these statistics and to purchase these statistics

Mr R A Hall

Senior Information Officer
Information Office/Secretary's Department
Telephone: (02) 9551 9721

Broad Description

Wide range of longer run annual data on the Australian economy and financial system.

Purpose of Data

To provide an annual profile on the Australian economy.

Detailed Description*Population*

All segments of the Australian economy.

Superannuation Data Items

Some data cover data on superannuation assets (and share of the financial system [eg. Table 3.4]), superannuation related assets (eg. Tables 3.15 and 3.16), returns from superannuation and related investments (Table 3.18), national and financial accounts aggregates on household sector flows into and holdings of superannuation and related assets (Tables 3.25, 5.5, 5.21). Also includes other economic aggregates relevant to (longer term) research into superannuation (eg. population, age structure, employment, prices).

Source

The Australian Bureau of Statistics and the Insurance and Superannuation Commission (sources listed in publication). Some data estimated by the Reserve Bank of Australia (eg. financial flows from 1953/54 to 1985/86).

Method of Collection

See Source details.

Frequency

Annual.

Timeliness

Australian Economic Statistics is an "Occasional" paper only. Data updates obtainable from sources quoted.

Historical Data

Some series back to 1949/50.

Geographic Breakdown

Australia only, no state break-ups available.

Confidentiality and Availability

Data provided by external sources are subject to confidentiality restrictions and/or secrecy provisions.

Unpublished Information

Not available.

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Reserve Bank of Australia Bulletin

Name of Organisation

Reserve Bank of Australia

GPO Box 3947

SYDNEY NSW 2001

Switchboard: (02) 9551 8000

Facsimile: (02) 9221 5528

Web Site: <http://www.rba.gov.au/>

Products and Services

Name/Title of Product

Reserve Bank of Australia Bulletin

Dissemination Media

Publication \$2.50 per issue. Also available on floppy disk \$60.00 (data only).

Contact

About these statistics and to purchase these statistics

Mr R A Hall

Senior Information Officer

Information Office/Secretary's Department

Telephone: (02) 9551 9721

Broad Description

Wide range of monthly and quarterly data on Australian economy and financial system. Superannuation a comparatively minor component.

Purpose of Data

To provide a quarterly profile of the Australian economy.

Detailed Description

Population

All segments of the Australian economy.

Superannuation Data Items

Some data cover superannuation assets (and share of the financial system [e.g. table D.5]). Superannuation related assets (e.g. tables C.12 to C.15). Data on retirement savings accounts (especially by banks) to be included in due course.

Source

Data initially published by the Australian Bureau of Statistics and the Insurance and Superannuation Commission (sources listed in publication). Some data estimated by the Reserve Bank of Australia (e.g. pre 1988 data in C.13).

Method of Collection

See Source details.

Frequency

Quarterly.

Timeliness

Follows source publications.

Historical Data

D.5 - June 1958, C.12 - June 1969 : C.13-15 - June 1985. All to date.

Geographic Breakdown

Australia.

Confidentiality and Availability

Data provided by external sources are subject to confidentiality restrictions and/or secrecy provisions.

Unpublished Information

Not available.

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Industry and product analysis (various products)

Name of Organisation

Rice Kachor Research

16 The Avenue

HURSTVILLE NSW 2220

Switchboard: (02) 9580 9277

Facsimile: (02) 9954 1632

Web Site: www.rkr.com.au/-rkr

Email: rkr@rkr.com.au

Products and Services

Name/Title of Product

- Analysis (\$1,295.00 pa)
- Analysis by State (\$1,495.00 pa or \$1,025.00 per issue)
- Asset Analysis (\$2,195.00 pa);
- Master Trust Analysis (\$2,495.00 pa)
- Group Insurance Analysis (\$1,895.00 pa)
- Personal Super Analysis (\$2,495.00 pa)
- Annuity & Pension Analysis (\$1,895.00 pa)
- Personal Super League Table (\$99.00 pa)

- Annuity & Pension League Table (\$99.00 pa)

Dissemination Media

All products are available as publications. See Name/Title of Product above. It is expected that future publications will be available on disk.

Contact

About these statistics

Mr Michael Rice

Executive Director

Telephone: (02) 9580 8566

To purchase these statistics

Ms Jenny Wong

Technical Analyst

Telephone: (02) 9580 9277

Broad Description

Various reports analyse market share of life insurance companies, asset allocation of life insurance statutory funds and comparison of products available to the public (personal superannuation, superannuation master trusts, group insurance, annuities and pensions).

Purpose of Data

Specialist research targeted towards practitioners in each field.

Detailed Description

Population

All life insurance companies which submit a return to the Insurance and Superannuation Commission. Major fund managers offering specified products to the public (personal superannuation, superannuation master trusts, annuities and pensions).

Superannuation Data Items

- Analysis and Analysis by State contain details of market share of life insurance companies, premium income (annual premium and single premium basis), asset size and number of funds, at the national level and state level in the respective publications.
- Asset Analysis contains details of asset allocations of statutory funds of life insurance companies.
- Master Trust Analysis contains details of 75 master trust products, being all those issued by life insurance companies and the major master trusts issued by prospectus. The survey provides analysis on a product by product basis, comparison of fees and charges, market share analysis and overview of the market as a whole.
- Group Insurance Analysis contains details of 19 group life products, 15 salary continuance products and 8 group trauma products, being all those issued by life insurance companies and the major group life products issued by prospectus. The survey provides analysis on a product by product basis, comparison of fees and charges, market share analysis and overview of the market as a whole.
- Personal Super Analysis contains details of 80 personal superannuation products (including rollovers), being all those issued by life insurance companies and the major personal superannuation products issued by prospectus. The survey provides analysis on a product by product basis, comparison of fees and charges, market share analysis and overview of the market as a whole.

- Annuity and Pension Analysis contains details of 93 immediate annuity and allocated pension products, being all those issued by life insurance companies and the major products issued by prospectus. The survey provides analysis on a product by product basis, comparison of fees and charges, market share analysis and overview of the market as a whole.
- Personal Super League Table & Annuity League Table provide data on fund size and cash flow as well as investment performance over 1,2,3 and 5 years.
- The Annuity & Pension League Table contains data on immediate annuities and allocated pensions. These reports are the ideal quick reference guide to investment performance for retail single premium, superannuation and retirement incomes products.

Source

Source material includes the Insurance and Superannuation Commission statistics, policy documents, prospectuses and responses to questionnaires.

Method of Collection

Data are collected from several sources. Statistical publications and product surveys all contain information about the whole market. Samples are not used.

Frequency

Quarterly or Annual (varies by publication).

Timeliness

Material is issued approximately four months after the reference period.

Historical Data

Varies by product but some data are available for an eight-year period.

Geographic Breakdown

This information is provided when known at State and Territory level.

Confidentiality and Availability

Readily available on subscription.

Unpublished Information

Unpublished data can be made available on a fee for service basis. Price on application.

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William M Mercer Pooled Funds Survey

Name of Organisation

William M Mercer Pty Ltd

101 Collins Street

MELBOURNE VIC 3000

Switchboard: (03) 9245 5555

Facsimile: (03) 9245 5330

Email: sjackman@ozemail.com.au

Products and Services

Name/Title of Product

William M Mercer Pooled Funds Survey

Dissemination Media

Publication \$300.00 pa. This is also available on floppy disk and as a software package. Prices for these two products are available on application.

Contact

About these statistics and to purchase these statistics

Ms Betty Ryan

Investment Analyst
Investment Consulting
Telephone: (03) 9245 5597

Broad Description

Investment returns of pooled superannuation funds.

Purpose of Data

Used for monitoring performance of fund managers.

Detailed Description*Population*

41 fund managers are included in the survey. The managers included are those involved in the wholesale segment of the superannuation industry.

Superannuation Data Items

The data are investment returns (net of tax and fees) achieved by each manager included in the table over four periods being 3 months, 1 year, 3 year and 5 year.

Source

Source data (in terms of unit prices) are collected directly from fund managers.

Method of Collection

Unit prices are sent to William M Mercer at the end of each month by fund managers included in the survey. The survey covers all significant fund managers in the industry.

Frequency

Monthly.

Timeliness

Results are available approximately 10 days after the end of the survey month.

Historical Data

Data are available from January 1971.

Geographic Breakdown

Australia only.

Confidentiality and Availability

Not applicable. The Mercer Pooled Fund Survey is published in the Business Review Weekly every month.

Unpublished Information

Additional information is available on request.

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